

Facilitating with Teams

Host, present, and engage with confidence | Attendee guide

A quick reference from the October 8 tutorial. If you've used Zoom, most of Teams will feel familiar.

Getting started

How a training gets set up

1. **Account created:** Your training coordinator works with our tech team to give you a CTRL account with a Teams license.
2. **Log in:** We'll help you sign in and confirm your account works.
3. **Meeting scheduled:** Your training coordinator sets up the Teams meeting, adds you as an attendee, and sets your role to co-organizer.
4. **Accept the invitation** from your CTRL account.

Logging into Teams

1. Open Teams, either the desktop app or in your web browser.
2. Sign in with your CTRL email address and password. We create your account for you, so ignore the "Create one" link.
3. Complete multi-factor authentication if prompted.
4. Confirm your name or photo appears at the top right.

Starting your training

1. Select Calendar in the left-hand app bar.
2. Open the scheduled meeting and select **Join**.
3. Pick your camera and microphone on the preview screen.
4. Select **Join now**.

Meeting controls

Once you've joined, the controls are in the bar at the top of the window. Chat, React, and Raise hand work the same way they do in Zoom.

Control	What it does
Mic and camera	Turn your audio and video on or off
Share	Present your screen, window, or file
React	Raise your hand or send a reaction
Leave	Select the arrow to choose Leave or End meeting

End meeting ends the session for everyone. When the training is finished, select the arrow next to Leave, then choose End meeting.

What you can do as a co-organizer

You have nearly all the same controls as the person who scheduled the meeting:

- Start the meeting
- Allow attendees to enter
- Turn off the Lobby (called the waiting room in Zoom)

- Create and launch polls
- Run breakout rooms
- **Start and stop recording:** More > Record and transcribe > Start recording

Sharing, breakout rooms, and polls

Chat, polls, and breakout rooms work much like they do in Zoom, and you'll find them all in the top bar. Breakout rooms are called "Rooms" in Teams.

Sharing your screen, slides, or video

- Select **Share** at the top of the window, then choose the screen or window you want to share.
- If you're playing a video, turn on the sound toggle so attendees can hear it.
- Teams and PowerPoint are integrated, so presenting a PowerPoint gives you extra features. If you allow it, attendees can also navigate the slides, switch to a high contrast view, or translate the slide text into another language.

Breakout room requirements

- **What attendees need:**
 - People signed in with a free Microsoft Teams account
 - People joining from unsupported devices, such as CVI
 - People who aren't fully in the meeting when rooms open (for example, still in the lobby)
 - People using an older version of Teams
- **If a client wants to use Teams breakout rooms for their training, we should ask their participants to:**
 - Update Teams to the latest version, or join through a supported client (the desktop app, web, or mobile)
 - Sign in with a work or school account rather than a free Teams account, or an unsigned or anonymous join
 - Join the meeting fully before rooms open

Starting breakout rooms

1. **Create the rooms:** Choose how many rooms you need.
2. **Assign participants:** Assign automatically or manually. Automatic is the simplest option.
3. **Open the rooms:** Start the rooms and send participants in.
4. **Monitor and bring everyone back:** Visit rooms, send announcements, then close the rooms.

Polls and live feedback

1. **Create a new poll:** Choose from multiple choice, quiz, word cloud, rating, or ranking.
2. **Edit and launch:** Select the arrow to edit before launching. Polls can be set up ahead of time and saved as drafts.
3. **Launch an instant poll:** Use prebuilt polls for a quick question on the spot.
4. **Share the results:** Select Share to open a window showing the results, then use them to guide discussion.